

**JANUARY**

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January	<b>Trustees</b> --quarterly meeting. (20-3-322(1d), MCA)
First Monday in January	<b>County Superintendent</b> begins term of office after election. (20-3-202, MCA)
January 1	Holiday--New Year's Day. (20-1-305, MCA)
January 1	Deadline for changing school district boundaries, until the second Monday of August (except for consolidation or annexation proceedings under 20-6-203 and 20-6-205-208, which may take place at any time). (20-6-202 and 20-6-314, MCA)
January 1 through second Monday in August	Elementary school district boundaries may not be changed during this time except as listed in 20-6-206 through 208, MCA. (20-6-202, 20-6-314, MCA)
Mid-January	<b>OPI</b> sends clerks the TR-5 and TR-6 transportation claim forms. (ARM 10.7.101)
January 31	Bus inspections must be done for second semester. Buses must have passed inspection to be used on routes for reimbursement. (ARM 10.7.101)

**FEBRUARY**

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February-June	Prepare the budget.
February	<b>Candidates for trustee</b> must file for election with clerk of the district not less than 40 days before election day. (20-3-344, [1st Class Elem.] and 20-3-305, MCA [all other districts])
By February 1	<b>Board of Trustees</b> transmits the County Superintendent the district transportation claims (two copies). (20-10-145, MCA) (ARM 10.7.101)
By February 1	<b>Trustees</b> provide District Superintendent or County High School Principal with written notice of termination. (20-4-401, MCA)
February 1 or next school day	Trustees count enrollment and report to OPI on Spring Enrollment Report. (Due February 18) (20-9-311, MCA)

by February 15	<b>County Superintendent</b> transmits to Superintendent of Public Instruction first semester transportation claims (consisting of one copy of each district claim). (20-10-145(2), MCA) (ARM 10.7.101)
Upon receipt of transportation claims	<b>Superintendent of Public Instruction</b> audits first semester transportation claims and orders state reimbursement of approved amounts to be paid to all counties for allocation to district. (20-10-145, MCA and ARM 10.7.101) (Payment usually by 3/31)
Upon receipt of state transportation payment notice	County Superintendent orders first semester county transportation reimbursement based on state reimbursement to each district. (20-10-146, MCA and ARM 10.7.101)

**MARCH**

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March 1	<b>OPI</b> sends districts the "Preliminary Budget Data Sheet" showing certified ANB, GTB subsidies, and special ed funding for the following year's budget.
By March 15	<b>County Treasurer</b> sends all joint district revenues to designated custodian. (20-9-212(6), MCA)
By March 31	Audits by approved private auditor of districts with total federal expenditures greater than \$300,000 in a fiscal year due to Department of Commerce and OPI. (i.e., "A-133 Audits")

**APRIL**

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April	<b>Trustees</b> --quarterly meeting. (20-3-322(1d), MCA)
April	<b>Board of Public Education</b> --quarterly meeting. (20-2-112, MCA)
By April 30	<b>Superintendent of Public Instruction</b> will mail transportation claim forms to districts. (ARM 10.7.101)

**MAY**

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By May 1	<b>Trustees</b> apply to <b>County Superintendent</b> for school isolation status when ANB will be less than 10 for elementary or less than 25 for high school for the second consecutive year. (20-9-302(1), MCA)
By May 10	<b>Trustees</b> apply to Superintendent of Public Instruction for approval of increase in ANB (PAA-3) due to unusual enrollment increase when enrollment is expected to increase more than 6 percent ("anticipated enrollment increase"). <b>Superintendent of Public Instruction</b> must act by fourth Monday in June. (20-9-314, MCA)
By May 10	<b>Board of Trustees</b> transmits two copies of district second semester transportation claims to County Superintendent. (20-10-145, MCA and ARM 10.7.101)
By May 10	<b>Trustees</b> must submit form PAA-3 (Application of Additional ANB) to Superintendent of Public Instruction for opening a new school, creating a new 7-8 grade accredited program, or opening a new kindergarten. (20-5-313, MCA)
By May 15	<b>County Superintendent</b> submits application for school isolation to County Commissioners. (20-9-302(2), MCA)
Between May 15 and June 1	<b>County Commissioners</b> act on application for approval of isolated schools and return application to County Superintendent. (20-9-302, MCA)
By Third Saturday in May	<b>Trustees</b> hold organizational meeting. (20-3-321, MCA)
By May 24	<b>County Superintendent</b> transmits to Superintendent of Public Instruction second semester transportation claims (one copy of each district claim). (20-10-145(2), MCA and ARM 10.7.101)
Upon receipt of transportation claim form	The <b>Superintendent of Public Instruction</b> verifies claims and disburses the form approved amount of state reimbursement for second semester transportation. (ARM 10.7.101)
Upon receipt of transportation payment	<b>County Superintendent</b> orders disbursement of county reimbursement for second semester transportation on the basis of state reimbursement. (ARM 10.7.101)
Last Monday in May	Holiday—Memorial Day (20-1-305, MCA)
Before June 1	<b>County Superintendent</b> submits approved application for school isolation to Superintendent of Public Instruction who must act on the application by the fourth Monday in June. (20-9-302(3), MCA)

**JUNE**

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June	<b>Trustees</b> are advised to issue bonds dated either in June or December such that coupons are payable in June and December. (20-9-411, MCA)
By June 1	<b>Trustees</b> must provide <b>tenured teacher</b> with written notice of termination. A teacher not notified is automatically reelected. (20-4-204 and 205, MCA)
By June 1	<b>Trustees</b> must provide <b>non-tenured teacher</b> with written notice of termination or reelection. (20-4-206, MCA)
June	<b>Teachers</b> must provide <b>Trustees</b> with written notice of acceptance of reelection (i.e., new contract) within 20 days after notice of reelection. (20-4-205 and 206, MCA)
By June 1	<b>Trustees</b> apply to Superintendent of Public Instruction for opening or reopening of a high school, junior high school, or middle school. Superintendent of Public Instruction must act by fourth Monday in June. (20-9-313; middle school: 20-6-507; junior high: 20-6-505 (3), and 504(2); high school: 20-6-503, MCA)
By June 15	<b>County Treasurer</b> sends all joint district revenues to designated custodian. (20-6-502, MCA)
By June 1	<b>Trustees</b> request the county election administrator conduct a school election next year. (20-20-417, MCA)
By June 15	<b>Trustees</b> must pay the remaining tuition amount under provisions of 20-5-306. (20-5-324, MCA)
Before fourth Monday in June	<b>Trustees</b> act on any applications for increased individual transportation reimbursement due to isolation of the transportee. (20-10-132(c), MCA)
Before fourth Monday in June	<b>Trustees</b> apply to Superintendent of Public Instruction for approval of transfer of ANB from closed school. Superintendent must approve, disapprove, or adjust the estimated ANB increase before the fourth Monday of June. (20-9-313(3), MCA)
By fourth Monday in June	<b>Superintendent of Public Instruction</b> acts on county-approved applications for approval of isolated schools and notifies County Superintendent and Board of Trustees of action. (20-9-302, MCA)

**2-0200.00****CALENDAR OF OFFICIAL DUTIES (Cont'd)**

By fourth Monday in June	<b>TR-4 Transportation Contracts</b> must be completed. Contracts may be completed after this date for students who move into the district or become eligible transportees after this date. (20-10-124(2), MCA and ARM 10.7.101)
By fourth Monday in June	<b>Chairman of the Board of Trustees and parents or guardians of pupils to receive transportation services</b> in ensuing year, complete and sign four copies of contracts for transportation as a prerequisite to including such transportation expenditure in the ensuing year's budget. Board of Trustees also complete with bus contractor(s) any new bus contracts for ensuing year. (20-10-124(2), MCA and ARM 10.7.101)
By fourth Monday in June	<b>County Transportation Committee</b> approves/amends bus routes and acts on applications for increased individual transportation payments due to isolation. (ARM 10.7.101)
Upon receipt of transportation claims	<b>Superintendent of Public Instruction</b> audits second semester transportation claims and orders state reimbursement of approved amount to be paid to counties for allocation to districts. (Payment usually by 6/15) (20-10-145, MCA)
Upon receipt of state transportation payment notice	<b>County Superintendent</b> orders second semester county transportation reimbursement based on state reimbursement to each district. (20-10-146, MCA)
By June 15	<b>County Treasurer</b> sends all joint district revenues to designated custodian (20-9-212(6), MCA)
By June 15	<b>Trustees</b> pay tuition amounts owed for preceding year. (elementary: 20-5-324(7), MCA)
By June 30	<b>Board of Trustees</b> may adopt a resolution for a budget amendment due to causes other than an unusual enrollment increase. (20-9-162, MCA)
June 30	<b>End of school fiscal year.</b> All budget appropriations lapse except appropriations for "uncompleted improvements in progress on construction" and properly authorized obligations to purchase personal property in manner prescribed by Superintendent of Public Instruction. (20-1-301, 20-9-209, MCA)
By year-end - June 30	<b>Trustees</b> designate a portion of the General Fund end-of-year cash balance as a cash reserve for the purpose of paying warrants issued from July 1 through November 30. (20-9-104, MCA)
By June 30	<b>Audits</b> by approved private auditors of districts with greater than \$200,000 total revenue and less than \$300,000 federal expenditures in prior fiscal year due to Department of Commerce and OPI. (i.e., "Regular Audit" or "Yellow Book Audit")

JULY

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July	<b>Montana Highway Patrol</b> will perform the first semiannual inspection of school buses at least 30 days prior to the beginning of the school term and reinspect the buses, if necessary, before the beginning of the school term. (ARM 10.7.101)
July	<b>Board of Public Education</b> --quarterly meeting. (20-2-112, MCA)
Before July 1 of third year	<b>County Superintendent</b> must notify any non-operation district that the district will be abandoned after 3 years of non-operation. (20-6-209(2), MCA)
By July 1	<b>District Clerk</b> transmits to the County Superintendent the TR-4 individual transportation contracts together with any new bus contracts. (ARM 10.7.101)
July 1	<b>Beginning of School Fiscal Year.</b> (20-1-301, MCA)
July 1	<b>Trustees</b> of any non-operating district establish a Non-operating Fund. (20-9-505, MCA)
July 4	Holiday—Independence day. (20-1-305, MCA)
By July 10	<b>County Superintendent</b> checks transportation contracts and transmits one copy of each individual and increased individual transportation contract to Superintendent of Public Instruction. Two copies are returned to the school district. (20-10-124(4), MCA and ARM 10.7.106)
By July 10	<b>County Treasurer</b> prepares cash balance statement for each district and for the county school funds and delivers such statements to the County Superintendent. (20-9-121, MCA)
By July 10	<b>Board of Trustees</b> of school district with state-approved traffic education program submits application for state reimbursement to Superintendent of Public Instruction. (20-7-502, MCA)
By second Monday in July	<b>County Assessor (Department of Revenue)</b> transmits a statement of the assessed valuation, taxable valuation and certified mills of each school district and each city and town to County Superintendent and to all involved County Superintendents and County Commissioners for joint districts (20-9-122 and 15-10-202, MCA)
Before July 15	<b>Trustees</b> of each district with non-resident students who attended under mandatory attendance agreements must submit a tuition report (FP-15) to the County Superintendent. (20-5-324, MCA)

**2-0200.00****CALENDAR OF OFFICIAL DUTIES (Cont'd)**

By July 15	<b>County Superintendent</b> of both counties in which a joint district is situated exchange the "Joint District Basic Data Transmittal Form."
Immediately after July 15	<b>County Superintendent</b> notifies districts concerning tuition obligations or transmits to other County Superintendents claims pertaining to tuition obligations.
Between July 24 and Aug 4	<b>Clerk</b> of each district publishes notice concerning availability of budget for inspection and also the schedule for final budget meeting. (20-9-115) If a "taxpayer information" hearing is to be held in conjunction with the final budget meeting, notice must also be give approximately 7 days before the meeting. (15-10-204, MCA)
Before July 30	<b>County Superintendent</b> shall report names, districts of attendance, the amount of tuition paid by the district for resident students attending public schools out of state to the Superintendent of Public Instruction on the FP-7 form. (20-5-324, MCA)

**AUGUST**

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August	<b>Trustees</b> - Quarterly meeting (20-3-322(1d), MCA)
Before August 1	<b>Trustees</b> must have conducted an election for authority to adopt a general fund budget in excess of the amount established by las, if needed. (20-0-353, MCA)
First Monday in August	<b>County Superintendent</b> of county where school is located transmits "Joint District Tax Levy Summary Form" to County Superintendent of county where school is not located.
Before the second Monday in August	<b>County Superintendent</b> estimates revenue by fund and any other statistical data. (20-9-123 and 20-9-141, MCA and others)
Before the second Monday in August	<b>County Superintendent</b> sends TR-4 transportation contracts to the Superintendent of Public Instruction. (20-10-143, MCA)
Second Monday in August	<b>Trustees</b> of each district must meet to adopt final budget. Upon adoption, the final budget is signed by the Chairman of the Board of Trustees and the District Clerk. (Meeting may be continued from day-to-day until the fourth Monday in August. If any line item of a budget provides payment of wages/ salary for more than one person, district must submit a list of compensation for each position.) (20-9-131 through 133, MCA)
By August 15	<b>Trustees</b> submit annual Trustees' Financial Summary to <b>County Superintendent</b> . (20-9-213, MCA)

**2-0200.00****CALENDAR OF OFFICIAL DUTIES (Cont'd)**

Within five days after budget meeting	<b>District</b> transmits copy of Final Budget and Trustees' Financial Summary to County Superintendent. (Recommended)
By Friday preceding the fourth Monday in August	<b>County Superintendents</b> of each county involved in a joint district must finalize a joint statement of the mills needed for each budgeted fund of a joint district. Deliver the statement to County Commissioners of each county. (20-9-151, MCA)
By fourth Monday in August	<b>County Superintendent</b> computes levy requirements for each district. For joint districts the deadline is the Friday before the fourth Monday of August. (general 20-9-141, 151; retirement 20-9-501, building reserve 20-9-503, non-operating 20-9-506, transportation 20-10-144, bus depreciation reserve 20-10-147, adult education 20-7-705, debt service 20-9-439)
Fourth Monday in August	<b>County Superintendent</b> presents County Commissioners with approved district budgets and with requirements for tax levies. (20-9-141 and 142, MCA)
Fourth Monday in August	<b>County Commissioners</b> shall fix levies on taxable value of all property within each district (Commissioners/other officers may be individually liable if debt service levy is not set as required by 20-9-444, 20-9-142 and 152, MCA.)
By August 31	<b>Superintendent of Public Instruction</b> orders state reimbursement for traffic education programs to qualifying districts and transmits payments to County Treasurers. (20-7-506, MCA)

**SEPTEMBER**

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September	<b>Justice of the Peace</b> reports all fines imposed and collected to County Superintendent. (20-9-332, MCA)
September	<b>Board of Public Education</b> --quarterly meeting. (20-2-112, MCA)
First Monday in September	Holiday--Labor Day. (20-1-305, MCA)
Second Monday in September	<b>County Superintendent</b> submits an annual report (Trustees' Financial Summary) to the Superintendent of Public Instruction. Report contains end-of-year financial report for each school district and any other information requested by the Superintendent of Public Instruction. (20-9-211, 20-3-209, MCA)
Second Monday in September	<b>County Superintendent</b> must complete budget form for each district and send a copy to the Superintendent of Public Instruction. NOTE: On MAEFAIRS electronic data transfer system, districts must upload the budget and Trustees' Financial Summary report files together by the second Monday in September. (20-9-134, MCA)



**2-0200.00****CALENDAR OF OFFICIAL DUTIES (Cont'd)**

September 10	<b>Birthday cutoff</b> date for 5-year-olds entering kindergarten (20-7-117, MCA)
September 10	<b>Birthday cutoff</b> date for 19-year-olds in ANB counts. Students who reach age 19 on or before September 10 of the school year may not be counted for ANB.

**OCTOBER**

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By October 1	<b>District Clerk</b> submits to County Superintendent each "Application for Registration of School Bus and State Reimbursement" (Form TR-1) for routes with elementary riders only. (ARM 10.7.101)
October	<b>Trustees</b> --quarterly meeting. (20-3-322(1d), MCA)
October	<b>Teacher or Specialist</b> must register his teaching certificate with County Superintendent within 60 days after starting work (salary is not paid if certificate is not registered within 60 days). (20-4-202, MCA)
October	<b>Bus drivers</b> must have completed the first-aid competency requirement within 60 days of school beginning or 60 days of date of employment. (ARM 10.7.101)
October	<b>Superintendent of Public Instruction</b> completes action on all applications for increased rates for individual transportation, establishes transportation payment responsibility of multiple districts providing transportation services to the same family, and notifies County Superintendent and the Responsible School Official of approved rates for individual payments. (20-10-112(6) and 142(3), MCA)
First Monday in October	<b>Trustees</b> note official fall enrollment count for ANB purposes. (20-9-311, MCA)
After 1st Monday in October	<b>Trustees</b> may petition the Superintendent of Public Instruction to adopt a budget amendment for unusual enrollment increase under 20-9-161 through 168, MCA.
By mid-October	<b>Superintendent of Public Instruction</b> must notify county superintendents and district clerks of approved rates for individual and isolated contracts. (ARM 10.7.101)
In mid-October	<b>Board of Trustees</b> transmits "Fall Report" (FR-4) to Superintendent of Public Instruction and County Superintendent for school accreditation and other purposes. (20-7-102, MCA)

Upon receipt of state approved transportation rates	<b>County Superintendent</b> notifies County Treasurer of details of approved transportation contracts.
Upon receipt of state approved transportation rates	<b>Board of Trustees</b> transmits a copy of transportation contract to each parent or guardian with whom a contract was made.
By October 15	<b>County Superintendent</b> transmits to Superintendent of Public Instruction one copy of each "Application for Registration of School Bus and State Reimbursement for routes with elementary riders only." (Form TR-1) (ARM 10.7.101)

## NOVEMBER

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November 14 or first pupil instruction day after	<b>District</b> must count the eligible high school riders who ride the bus at least one morning during the 5-day count period. (ARM 10.7.101)
Fourth Thursday	Holiday—Thanksgiving Day. (20-1-305, MCA)

## DECEMBER

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December	<b>Trustees</b> are advised to issue bonds dated either in June or December so that coupons are payable in June and December. (20-9-411, MCA)
December	<b>County Superintendent</b> must pay out-of-county "mandatory" tuition obligations for students attending school outside the county. (20-5-324), MCA)
December	<b>Trustees</b> must pay at least half of the tuition owed to each district on the notification under provisions of 20-5-324, MCA.
December	<b>Board of Public Education</b> —quarterly meeting (20-2-112, MCA)
By December 1	<b>District Clerk</b> submits to County Superintendents each "Application for Registration of School Bus and State Reimbursement" (Form TR-1) for routes having both elementary and high school riders. (ARM 10.7.101)
By December 10	<b>County Superintendents</b> transmit to Superintendent of Public Instruction one copy of each "Application for Registration of School Bus and State Reimbursement" (Form TR-1) for routes having both elementary and high school riders. (ARM 10.7.101)
By December 15	<b>County Treasurer</b> sends all joint district revenues to designated custodian. (20-9-212(6), MCA)
December 25	Holiday—Christmas Day. (20-1-305, MCA)

## UNDATED DUTIES:

Monthly	<b>County Treasurer</b> must give itemized financial statement to Trustees monthly. (20-9-212(10), MCA)
Within 10 days after the conclusion of each school semester	<b>Teacher</b> must provide annual attendance report to District Superintendent, Principal or County Superintendent (salary is withheld until report is submitted). (20-4-301(1d), MCA)
	<b>District Superintendent or County High School Principal</b> must report cumulative pupil attendance and pupil absence of the district to the County Superintendent. (20-4-402 and 403, MCA)
To commence within nine months of close of last fiscal audit period	<b>Approved private auditor</b> audits accounts of districts with greater than \$200,000 total revenue and less than \$300,000 federal expenditures in a fiscal year (i.e., "Regular Audit" or "Yellow Book Audit"). Audit is due to OPI by 6/30 of the year following the year being audited. (20-9-203 and 504, MCA)
At any time	<b>Board of Trustees</b> of school district preparing to offer a traffic education program applies to Superintendent of Public Instruction for approval prior to beginning the program to comply with requirements for state reimbursement. (20-7-502, MCA)
Whenever required	<b>Board of Trustees</b> completes transportation contracts with individuals who move into the district after the adoption date of the budget or with those who, for other reasons, become eligible for transportation. <b>Trustees</b> transmit contracts to County Superintendent, who transmits the original copies to Superintendent of Public Instruction. (20-10-124, MCA)
Whenever required	<b>Board of Trustees</b> issues Montana Schools Bus Driver Certification to bus driver and transmits required copies to County Superintendent and Superintendent of Public Instruction. (20-10-103, MCA)
Whenever required, upon receipt by the county of revenues for current school budgets	<b>County Superintendent</b> apportions all school moneys for current budgets to the school district and certifies the amounts apportioned to each Board of Trustees and the County Treasurer.
Once ever three years	<b>County Superintendents</b> shall review existing school district boundaries. (20-6-215, MCA)

Elections (see MASBO Elections manual for more information)

Election Day minus 135	<b>Trustee candidates</b> may file for election from 135 days before the election to 40 days before the election. (13-10-201, 20-3-305 and 20-3-344, MCA)
Election Day minus 75	Voters may request an <b>absentee ballot</b> through noon on the day before the election. (13-13-211, MCA)
Election Day minus 40	<b>Trustees</b> shall call each election by resolution. (20-20-201(1) and 203, MCA)
Election Day minus 35	<b>Trustees</b> must send a copy of the election resolution to the county election administrator. (20-20-201(2) and 203, MCA)
Election Day minus 30	Registration for election closes. (20-20-311 and 312, MCA)
not less than Election Day minus 25	<b>Clerk</b> of district prepares certified list of candidates and official wording of each ballot issue. (20-20-401, MCA)
Election Day minus 20	<b>Trustees</b> must have absentee ballots printed and available (20-20-401, MCA)
Election Day minus 15	Deadline for <b>write-in candidates</b> to file declaration of intent. (13-10-211, MCA)
Election Day minus 10	<b>Trustees</b> must appoint election judges. (20-20-203, MCA)
Election Day minus 1	<b>Trustees</b> provide ballots and supplies at each polling place. (20-20-401(3), MCA)
Election Day minus 1 by 5 p.m.	Absolute last day for <b>write-in candidates</b> to file a declaration of intent in cases where the candidate for the office the write-in candidate seeks dies, withdraws or is charged with a felony offense less than 15 days before the election. (13-10-211, MCA)
Election Day (20-20-105, MCA)	The <b>election administrator</b> must prepare polling places, print ballots, ensure election judges are present and conduct a fair and unbiased election. (Title 13, Chapter 13; 20-20-203, 20-20-401 and 20-20-411, MCA)
Election Day plus 15	<b>Trustees</b> certify election results. (20-20-416, MCA)

Please submit suggested additions to this calendar to OPI.